

NEW HORIZONS FOR PRIMARY SCHOOLS
CONTRACTOR'S PERFORMANCE REPORT
TENTH AWARD FEE PERIOD
January to June 2003

INTRODUCTION

This Award Fee Evaluation Performance Report was prepared in accordance with contract No. 532-C-00-98-12345-00 between Juárez and Associates, Incorporated (J&A) and the United States Agency for International Development (USAID). It is the tenth and final report of this nature under the contract which ended June 2, 2003.

As a "Cost-Plus-Award-Fee" contract, periodic evaluation of on-going performance of J&A is required. It is our intent that this document provides the Cognizant Technical Officer and the technical panel with a thorough and accurate account of the activities undertaken for the Performance Award Fee Period, January to June 2003.

New Horizons for Primary Schools (NHP) is a bold effort at educational reform which invites stakeholder participation in decision-making. As opposed to centralized, "expert-oriented" approaches to project implementation, the NHP is a partnership between project schools, community members, the Ministry of Education, Youth and Culture (MOEYC), USAID, and Juárez and Associates--all of whom are committed to the betterment of education in Jamaica.

The end of this tenth award fee period marks the completion of the implementation of the initial contract for J&A under the New Horizons Project. As was the case in earlier report periods, it is safe to say that many of the deliverables submitted have been the result of a shared commitment and participation of a representative number of project stakeholders. Since it is the last performance report under this contract, most of the award fee criteria are related to the contract closing activities. While J&A is solely responsible for meeting the award fee deliverables, they all reflect this "orchestration" of stakeholder interests and efforts. Furthermore, while the degree of effort underlying the promotion of this participatory approach is not easily appreciated by merely reading the deliverable documents, one can say that this effort is, in fact, the most important of all "deliverables" in the quest to make a significant impact toward the improvement of literacy and numeracy among the nearly 30,000 children enrolled annually in the targeted schools and over 45,000 served under NHP to date.

To provide an overall understanding of the accomplishments of the present award fee period, the contractor's report includes two tables intended to provide the reader with an up-dated perspective on the specific level of effort to date in meeting project objectives. These are as follow: (a) the list of the criteria for this period and their respective completion dates (Table I) and (b) the tenth award fee period deliverables within the context of earlier achievements (Table II). These are categorized under their respective interventions and corresponding intermediate results. As an appendix, a copy of the "Responsibility Chart" used to coordinate the completion of this reporting activity serves

to provide a glimpse of the collaborative manner in which the Project Implementation Unit (PIU) accomplished these tasks. Following Table I below, a summary statement is presented regarding the activities engaged in to meet each of the six (6) award fee criteria as well as a statement as to any relevant challenges experienced for the period.

TABLE I

TENTH AWARD FEE DETERMINATION NEW HORIZONS FOR PRIMARY SCHOOLS PROJECT PERIOD - JANUARY TO JUNE 2003 CONTRACT #532-C-00-98-12345-00	
AWARD FEE CRITERIA	COMPLETED
1. Closing Activity: Innovative Programs, Teacher Training and Others Juárez and Associates (J&A) to provide USAID with the Institutional Contractor's "Final Report" on New Horizons for Primary Schools.	June 2003
2. Closing Activity: Resources Inventory J&A to complete an inventory of project equipment, supplementary materials and supplies as required.	May 2003
3. Educational Technology J&A to provide a report on the Status of the Educational Technology intervention vis-à-vis the plans for the academic year.	May 2003
4. Project Formative Evaluation: Quality of Teaching and Other J&A to complete the fieldwork phase of the annual formative evaluation.	May 2003
5. Performance of J&A in terms of budgeting, accuracy of funding projections and control of costs.	N/A
6. Responsiveness of J&A to USAID's technical and administrative directives.	N/A

SUMMARY STATEMENT

With the intent of informing USAID on the manner in which the performance criteria were met for the Tenth Award Fee Period, the following summary is provided. A statement is presented for each of the criterion. Within this statement, as appropriate, some of the challenges encountered in conducting the activities during the pre-established timeline are identified. Documentation has been presented as required to support the Contractor's response to the award fee criteria for the period. Additional information is available upon request.

Criterion #1 - Closing Activity: Innovative Programs, Teacher Training and Others

Juárez and Associates (J&A) to provide USAID with the Institutional Contractor's "Final Report" on New Horizons for Primary Schools.

This criterion was met with the completion of the Final Report covering the major goal and purpose in relation to the USAID Mission's Strategic Objective, listing the accomplishments and providing a reference to key products. The major difficulty in accomplishing this performance criterion had to do with the timing given the fact that the contract was officially completed as recently as June 2, 2003 and many of the closing activities such as end-of-tour reports from the Project Implementation Unit subject-matter specialists, input from the NHP partners, and inventories required much more time beyond that date than anticipated when the award fee criteria were formulated and agreed upon six months ago. Hence, as of the writing of this performance report, input from one partner is just being read for inclusion in the Final Report.

Criterion #2 – Closing Activity: Resources Inventory

J&A to complete an inventory of project equipment, supplementary materials and supplies as required.

This criterion was fully met in a timely manner in the form of a spreadsheet presenting the results of an inventory of all equipment, materials and supplies for which the Institutional Contractor was responsible under this contract. This is comprised of a list the office supplies, software and the equipment both in office and the project schools that were readied for transfer to the Ministry of Education, Youth and Culture should the contractor not have been notified on May 30, 2003 of it being awarded the final, two-year technical assistance contract for the NHP extension to May 2005. The supplies, software and equipment inventoried are those items that are part of the procurement funded by USAID under the initial contract with J&A. The items listed in the inventory are listed with the name of the persons to whom they are assigned and/or the person who is responsible for the safe keeping of the equipment when not in use. The inventory also provides adequate information for an audit should it be required. United States Agency for International Development decals are used to show financial support and to account for the items that are listed in the inventory. Three completed sets of the inventory of resources were presented to the Cognizant Technical Officer prior to the end of May.

Criterion #3 - Educational Technology

J&A to provide a report on the Status of the Educational Technology intervention vis-à-vis the plans for the academic year.

The major activities undertaken by the New Horizons for Primary School Project under the guidance and leadership of the contractor and its technical assistance resources during the approximate final twelve months of the project were reported on as agreed in the “NHP Educational Technology Report: May 2003”. The report, as intended, covers the activities under NHP Intervention # 7, Educational Technology, has been serving project partners as a reference document in planning for the two-year NHP extension period through May 2005. The status report begins with a concise yet comprehensive background statement on the educational technology activities in NHP schools up to the summer of 2002 followed by a report on the plans and progress in this area under nine key activities included in the NHP Annual Workplan for the period. The report provides a concluding statement which calls for an accelerated, even more concerted effort in this high-cost and potentially rewarding component of the project’s efforts to further improve numeracy and literacy achievement among the targeted school children.

Criterion #4 - Project Formative Evaluation: Quality of Teaching and Other

J&A to complete the fieldwork phase of the annual formative evaluation.

This criterion was satisfactorily completed under the direction of Ms. Heather Simpson and Mr. José Ferrel, Home Office Coordinator, whose activities are detailed within their trip report, submitted in June 2003. The primary purpose of this consultancy was to prepare the previously trained local evaluation team to once again carry out systematic data collection for the 2003 formative evaluation of the New Horizons for Primary Schools (NHP) project. All data collection activities were completed by the third week of May and included twenty-five (25) sample schools and a total of fifty-three (53) third grade classrooms. Once diagnostic test results are made available for Grades 3 and 6, these data will be used to inform the next phase of the New Horizons project of progress in implementing program activities and the findings of this evaluation will be used to measure project results.

Specifically, Simpson and Ferrel traveled to Jamaica and led a review workshop for seven returning field team members. The objectives for the workshop were geared at enhancing the hands-on skills for utilizing the NHP instruments to carry out the formative evaluation of the project, and to provide background information and common definitions for ongoing NHP and MOEYC capacity building evaluation and monitoring. A variety of teaching methods and materials were reviewed throughout the two days, which included exercises with the evaluation instruments using videotapes of classroom interaction in schools as well as active discussion with participating members of the PIU about the direction of NHP activities this past year. The workshop was well received by the participants who were well prepared to engage in data collecting activities as evidenced by the high inter-rater reliability obtained during the exercises.

Prior to the review workshop, meetings were held with the Project Implementation Unit (PIU) to determine special data needs arising from their work in schools. Minor adaptations were made in the teacher and principal interview instruments to account for increased activity by the new PIU associates as well as the increasing focus on educational technology for this and the next phase of the Project. Following the workshop, in coordination with the field workers and NHP staff, Ferrel and Simpson developed a schedule for school visitations. Ferrel and Simpson identified a team leader within the local group, Mrs. Janett Ismay-Kerr, to coordinate the seven local field workers (all of whom participated in the evaluation methodology workshop) in their data collection efforts. The researchers worked in small teams of up to seven people and spent up to one full day at each school collecting data. Following each day of fieldwork, the team leader gathered the instruments from the teams, which was then delivered to Ferrel and Simpson who monitored the quality of the data collection and entered the information into SPSS spreadsheets. A total of twenty-five (25) schools were visited during the above-mentioned two-week period. These data files were saved on a 3.5" floppy disk and submitted to USAID along with the trip report.

Criterion #5 - Performance of J&A in terms of budgeting, accuracy of funding projections and control of costs.

J&A has submitted 3 invoices since the last fee criteria evaluation period and expect to submit March this week. These are based on the costs recorded in official books and records. J&A has a monthly accounting cycle and the public vouchers are prepared after the end of each month. The vouchers are reviewed by the Director of Finance & Contracts and include reconciliation of the vouchers to J&A's ledgers. The invoices contain the financial and management information required for oversight of the contract. Additionally, J&A provides quarterly expenditure status reports to the USAID COTR in a timely manner.

Currently, J&A is in contract close out mode and expending effort in finalizing payments, collecting & recording receipts for incurred costs, expediting payments to suppliers, and preparing final fiscal reports.

Criterion #6 - Responsiveness of J&A to USAID's technical and administrative directives.

USAID/Kingston and the Institutional Contractor agreed that a written report was not required in order to document performance under this criterion. Appropriate documentation is on file and can be made available to the reader to substantiate the high degree of responsiveness of the J&A team throughout this Tenth Award Fee Period. Thus, in closing this performance report, it is noted that all of the activities described herein contributed to the contractor's fulfilling the set of criteria established with USAID/Jamaica. While this set of criteria reflects a substantial portion of the activities conducted during the period of January to June 2003, a number of other activities were

also undertaken in a challenging and rewarding period for all partners engaged in the planning and implementation of NHP. The existence of challenges and the accomplishments achieved permeated the project at the school, community, regional and national levels. As in the past, it is the belief of the project director that all the technical and administrative directives were completed in a highly responsive manner throughout the period.

TABLE II

MOEYC - Ministry of Education and Culture
SDTs - School Development Teams
J&A - Juárez and Associates
PDU - Professional Development Unit
t - Criteria not identified/requested by USAID until subsequent award fee period(s)
BOLD - Bold criteria denote those activities addressing more than one intervention and/or Intermediate Result

AGGREGATED AWARD FEE CRITERIA WITH CORRESPONDING INTERVENTIONS AND RESULTS									
1 st Award Fee	2 nd Award Fee	3 rd Award Fee	4 th Award Fee	5 th Award Fee	6 th Award Fee	7 th Award Fee	8 th Award Fee	9 th Award Fee	10 th Award Fee
Intervention #1: Development of Mathematics and Literacy Programs for Project Schools Result : Improved quality of teaching									
J&A to submit to AID a draft Annual Implementation Plan ----- Establishment of SDT's and completion of draft Development Plans. ----- Identification of instruments for assessing of students in mathematics and reading.	J&A to provide a satisfactory report on the status of SDTs. ----- J&A to complete a diagnostic report on Project Schools.	J&A to provide status report on programs for teaching reading and math in project schools.	J&A to provide evidence that SDTs are guided by NHP principals. ----- J&A to monitor the design of individual school programs.	J&A to provide report on the implementation of site-based technical assistance plans and strategies to be conducted in NHP schools. ----- J&A to design and implement a monitoring plan to assist in the supervision of the site-based technical assistance.	J&A to provide evidence on teacher's ability to use new approaches in their interactions with students.	J&A to provide evidence of effectiveness of site-based technical assistance in contributing to literacy and numeracy.	J&A to provide evidence of the effectiveness of site-based technical assistance in contributing to literacy and numeracy instruction.	J&A to provide USAID w/ an approved Year Five Workplan developed from the LOP & from results of recent project evaluations. ----- J&A to provide evidence of improved school development planning in the area of numeracy and literacy, including well-defined strategies & approaches for effective implementation & monitoring of the annual Actions Plans.	J&A to complete the fieldwork phase of the annual formative evaluation.
Intervention #2 : In-Service Training of Teachers in Reading and Mathematics Result: Improved quality of teaching									
J&A to submit to USAID a draft Annual Implementation Plan ----- Establishment of SDT's and completion	J&A to provide a satisfactory report on the status of SDTs. ----- J&A to complete a diagnostic report on	J&A to workplan to conduct training to implement the new revised curriculum. ----- J&A to develop draft	J&A to provide evidence that teachers can use new approaches through lessons and student work.	J&A to provide report on the implementation of site-based technical assistance plans and	J&A to provide USAID with a status report on the implementation of the site-based technical assistance conducted in the	J&A to provide evidence of effectiveness of site-based technical assistance in contributing to literacy	J&A to identify the sites, teachers to be trained and specifications of the equipment for implementation of the	J&A to provide USAID w/ an approved Year Five Workplan developed from the LOP & from results of recent project	J&A to complete the fieldwork phase of the annual formative evaluation.

of draft Development Plans.	Project Schools. ----- J&A to provide the PDU with a report on teacher training needs.	teacher-training plans.	----- J&A to implement cluster workshops to improve teaching skills.	strategies to be conducted in NHP schools ----- J&A to design and implement a monitoring plan to assist in the supervision of the site-based technical assistance ----- For both Interventions 1 & 2, J&A to design and conduct a NHP Principals' Forum and report, with recommendations and follow-up activities based on the evaluation of the same.	seventy-two NHP schools during the period. ----- J&A to support the further improvement of individual mathematics and literacy programs in NHP schools and share effective practices in these two subject-matter areas.	and numeracy.	Educational Technology Intervention. ----- J&A to provide process evaluation findings on the quality of teaching in a sample of NHP schools.	evaluations.	
Intervention # 3: Governance and Leadership Training for School/Community Leaders (Interventions # 3 and #4 are under the National Council on Education) Result: Improved management of primary schools									
J&A to submit to AID a draft Annual Implementation Plan ----- Provision of assistance to the National Council on Education.	t t t t	J&A to submit draft of Study Tour Plan	t t t t	J&A to provide an Annual Workplan from LOP Work-plan and results of Year Two activities and evaluation.	t t t t	t t t t	t t t t	J&A to provide evidence of improved school development planning in the area of numeracy and literacy, including well-defined strategies & approaches for effective implementation & monitoring of the annual Actions Plans. ----- J&A to design & conduct an NHP Principals' Workshop for the purpose of sharing effective, exemplary administrative practices of principals	t t t t

								as instructional leaders.	
Intervention #4: Parent Education and Training Result: Improved school attendance and Improved parent-community involvement in schools									
J&A to submit to AID a draft Annual Implementation Plan. ----- Provision of assistance to the National Council on Education.	t t t t	J&A to submit draft of Study Tour Plan.	t t t t	J&A to provide an Annual Workplan from LOP Work-plan and results of Year Two activities and evaluation.	t t t t	J&A to provide evidence on contributions of incentive strategies to student attendance and stakeholders' enthusiasm.	J&A to implement incentive criteria to school-based improvement initiatives as a follow-up to the incentive strategies recommended in the related report presented to USAID and other stakeholders during the previous report period.	t t t t	
Intervention #5: Health and Nutrition Result: Improved school attendance									
J&A to submit to AID a draft Annual Implementation Plan. ----- Establishment of SDT's and completion of draft Development Plans. ----- Completion of needs assessment of Project Schools in health and nutrition.	J&A to provide a revised health component which replaces the de-worming activity.	J&A to conduct 7 focus groups on health nutrition and submit recommendations.	J&A to ensure that parent involvement in breakfast program follows nutrition specialist's guidance. ----- J&A to complete parent training manual in health education.	J&A to provide a status report on the implementation of the NHP Breakfast Program in the selected project schools.	J&A to provide a status report on the implementation of the breakfast program in the selected schools during the period and recommendations on its continuation for the school year 2001-2002.	J&A to provide evidence on contributions of the breakfast program to school attendance and related results.	J&A to provide breakfast program support in the six additional schools and to complete training for community development mobilization of re-sources in at least eight of the fourteen breakfast program schools.	t t t t	t t t t
Intervention #6: Supplementary Reading and Mathematics Materials Result: Improved quality of teaching									
J&A to submit to AID a draft Annual Implementation Plan. ----- Establishment of SDT's and completion of draft Development Plans.	t t t t	J&A to submit list of MOEYC approved materials. ----- J&A to submit a distribution plan for reading and mathematics materials.	J&A to ensure that each project school receives training in supplementary materials in reading and mathematics.	J&A to procure the MOEYC approved exemplary supplementary materials.	J&A to distribute to project schools all of the NHP procured exemplary supplementary materials and the 28,000 books donated by the International Book Project. ----- J&A to design and implement a seminar on the utilization of the	J&A to provide evidence on the effective utilization of supplementary materials and the related contributions to literacy and numeracy instruction.	t t t t	t t t t	t t t t

					32,000 volumes of supplementary materials distributed to the NHP schools during the period.				
Intervention #7: Educational Technology Result: Improved quality of teaching									
J&A to submit to AID a draft Annual Implementation Plan. ----- Establishment of SDT's and completion of draft Development Plans.	J&A to contract a specialist and conduct a "Feasibility Study" on the Educational Technology component.	t t t t	t t t t	J&A to present the Revised Educational Technology Plan to the MOEYC for approval.	J&A to submit a plan for effective implementation of NHP Educational Technology Intervention for the 2001-2002 year based on the current contract. ----- J&A to provide a report on the pro-gress being made in the use of portfolios (teacher and students) in the classrooms.	J&A to provide a needs-based action plan that addresses the hardware, software maintenance, and training components of the Educational Technology Intervention.	J&A to identify the sites, teachers to be trained and specifications of the equipment for implementation of the Educational Technology Intervention.	J&A to provide evidence that at least 50% of the participants at the July 2002 Ed Tech Workshop have effected application of math and literacy concepts to real world situations individually or cooperatively through projects. ----- J&A to provide evidence on the introduction of technology as an adjunct to the primary curriculum & as a mechanism for improved quality of teaching, based on the individual school plans for the report period.	J&A to provide a report on the status of the Educational Technology intervention vis-à-vis the plans for the academic year.
Intervention #8: Training Literacy and Mathematics Resource Teachers (under the MOEYC Professional Development Unit) Result: Improved quality of teaching									
J&A to submit to AID a draft Annual Implementation Plan.	t t t t	t t t t	t t t t	J&A to provide an Annual Workplan from LOP Work-plan and results of Year Two activities and evaluation.	t t t t	t t t t	t t t t	J&A to provide USAID w/ an approved Year Five Workplan developed from the LOP & from results of recent project evaluations.	t t t t
Intervention #9 and 10: Integration of Data Bases and Linking Schools with Regional and National EMIS Results: Improved quality of teaching and Improved management of schools									
J&A to submit to AID a draft Annual Implementation Plan. -----	t t t t	J&A to initiate installation process of administrative computers in schools.	t t t t	J&A to complete the selection of the six EMIS Technician/	J&A to install the customized Jamaica School Administrative Software in all 72 NHP	J&A to provide an implementation plan that addresses Interventions 9 & 10	J&A to develop final version of JSAS software incorporating ease-of-use and	J&A to complete installation, configuration and networking of the	t t t t

<p>Establishment of SDT's and completion of draft Development Plans.</p> <p>-----</p> <p>Contract Systems Analyst, complete needs assessment of MOEYC's PDU and develop program for the PDU and Project Schools.</p>		<p>-----</p> <p>J&A to initiate interconnection plan and specify equipment.</p> <p>-----</p> <p>J&A to install administrative software in school and regional office computers.</p>		<p>Trainers who are to assist in the training of school personnel and installation of the school management software in the project schools.</p>	<p>schools and initiate the site-based data entry and relevant training of key staff in each school.</p>	<p>for the remainder of the Project.</p>	<p>usefulness enhancements, accompanied by training strategy and first draft of training materials for expanding distribution of the JSAS system to additional schools.</p> <p>-----</p> <p>J&A to procure additional computers, basic networking equipment and spare parts to resolve the following: (a) system availability in larger schools and (b) hardware maintenance problems in all 72 schools.</p>	<p>computers for application of the JSAS software designed to expand access in each of the 25 medium to large schools that received additional computers at the end of the previous performance period.</p> <p>-----</p> <p>J&A to produce a JSAS user-friendly manual for application throughout the non-NHP schools in which it is to be cascaded & for reinforcement of JSAS software utilization amongst NHP schools.</p>	
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NEW HORIZONS FOR PRIMARY SCHOOLS
January-June 2003 Deadlines
PIU RESPONSIBILITY CHART

<div>PERSON</div> <div>TASK</div>	E. O'Neil	J. Gordon	R. Morris/NCE	B. Thompson	K. Edwards-Brown	B. Fearon	B. Vaughan	L. Brent-Harris	O. Grant	V. Brown	D. Morgan	S. Myers	B. Wilson	J. Ferrel	D. Dempsey	B. Newman	P. Thompson	B. Reilly	Comm. Dev. Specialist	Local Eval. Team	CCU	S. Bullock	Media SU	N. Duncan	SAU
1. Juarez and Associates (J&A) to provide USAID with the Institutional Contractor's Final Report on New Horizons for Primary Schools.	1				3	3	3	2	2	3	2	2	2	2	2	2	2	2						2	
2. J&A to complete an inventory of project equipment, supplementary materials and supplies as required.	2						3		1	3												2			
3. J&A to provide a report on the status of the Educational Technology Intervention vis-à-vis the plans for the academic year.	1									3				2				2				2	3		
4. J&A to complete the fieldwork phase of the annual formative evaluation.	3						3			3				1						2					3
5. Performance of J&A in terms of budgeting, accuracy of funding projections and control of costs.	3								2						1										
6. Responsiveness of J&A to USAID's technical and administrative directives.	1						2	2	2	2	2	2	2	2	2							2		2	

Key *1= Principal Responsibility* *2 = Secondary Responsibility* *3 = Collaborative Role* ** = Proof Reading*